



# Creating Web Reports that Rock

Web Manager University  
October 7, 2009

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## Jennifer Veesenmeyer



- ◆ VP of Analytics at Stratigent, LLC
- ◆ Live in Minneapolis
- ◆ Marketing Communication Background
- ◆ 11 yrs in Interactive Marketing
- ◆ 5 yrs in Search Marketing
- ◆ 4 yrs in Web Analytics Consulting
- ◆ Instructor for WAA Site Optimization training

**Oct 18 – DMA in San Diego**  
OMI Certification Training  
Integrating Social Media & Analytics

**Oct 23 – eMetrics in DC**  
Full Day Workshop  
Pimp Your Reports

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- ◆ Leader in web analytics consulting
- ◆ Proven methodologies to ensure success
- ◆ Wide range of analytics services

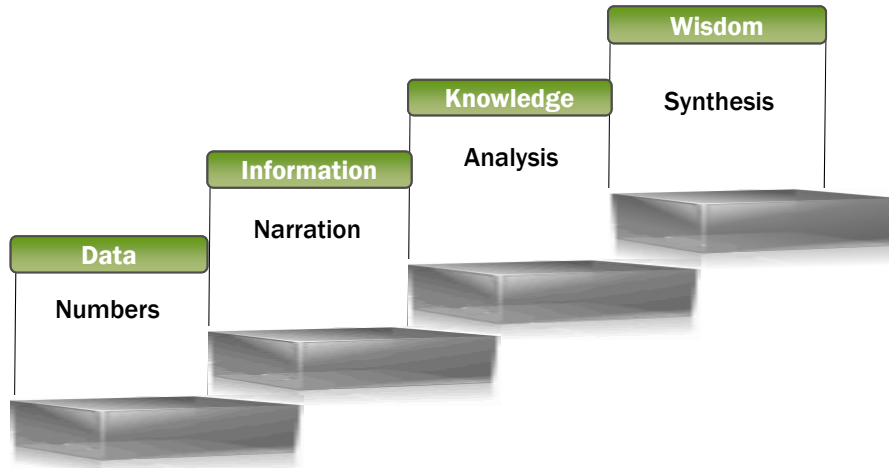
Strategy	Infrastructure	Benchmarking	Optimization
+ Strategic Roadmap Development	+ Implementation	+ KPI Definition	+ Proactive Analysis
+ Vendor Selection	+ Multi-Channel Integration	+ Dashboard Development and Automation	+ Testing & Optimization
+ Customized Training	+ Platform Integration	+ Competitive Analysis	+ Campaign Analysis
+ Strategic Roadmap Audit	+ Confidence Audit	+ Reporting Services	+ Conversion Audit
	+ Tagging Audit		+ Campaign Audit

### Poll Question #1

**How much time do you spend on reports?  
(not including data analysis)**

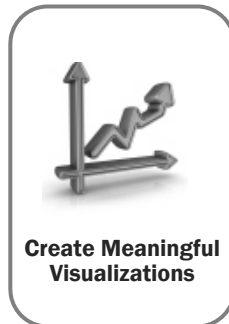
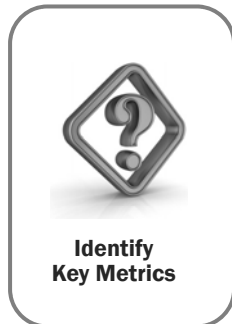
- A. I don't do any reporting
- B. < 2 hrs / week
- C. 2 – 5 hrs / week
- D. 6 – 10 hrs / week
- E. More than 11 hrs / week

## Path of Understanding



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## You'll learn how to:



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# Identifying Key Metrics

when everything is important,  
nothing is important

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**important things  
to know about KPIs**

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## There are multiple types of metrics

TYPE OF METRIC	EXAMPLE	USED TO ANSWER THE QUESTION
Outcome/business driver	New Visitors [as an Awareness metric] Customer Satisfaction	How well am I doing?
Diagnostic	Task Completion Rate	How can I do better?
Smoke alarm	Zero yield searches	What am I doing poorly?
Predictor/Leading indicator	Intent to Use as a Priority Resource	Will I do better?
Latent	Correlations, VOC, competitive data, etc	Where is the opportunity?

*\*Obviously, this is not an exhaustive list.*

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## Not All Important Metrics are KPIs

### A true performance indicator is:

- ◆ Tied directly to an objective
  - Awareness
  - Education
  - Acquisition (eg Sign-ups)
  - Advocacy
  - Support
- ◆ Rated or graded
- ◆ Time sensitive
- ◆ Embraced by the organization

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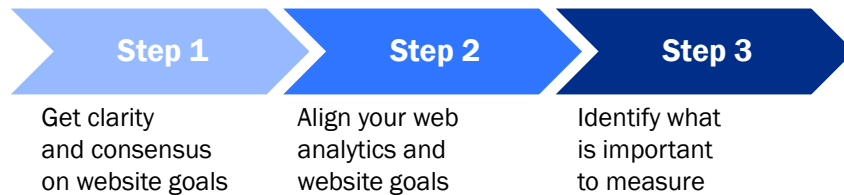


## No KPI is an Island



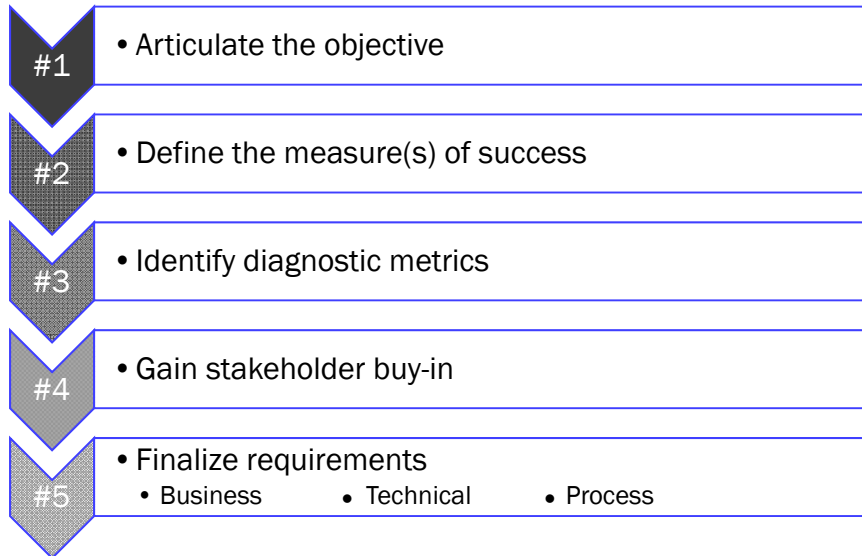
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## KPI identification is a 3 step process



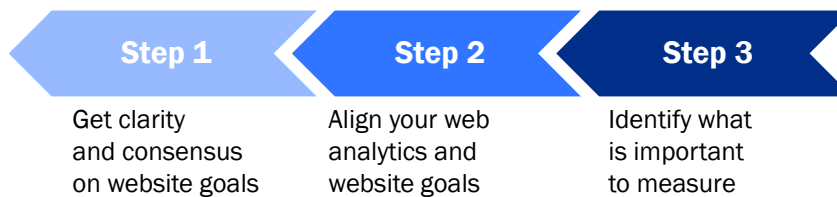
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## Strategic KPI Definition Process



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## It's more common to go backwards




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## Interim Metric Identification Process

- #1 • Identify the goal of the reports
- #2 • Identify your target audience(s)
- #3 • Determine which metrics will help you achieve the goal of the report
- #4 • Finalize interim requirements
  - Business
  - Technical

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## Common KPI Definition Issues for Gov't Sites

- 
- Unclear website objectives
  - Measuring the immeasurable
  - Too many KPIs
  - Misguided KPIs

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## Unclear website objectives

- ◆ Look for overarching objectives
- ◆ Tie into offline objectives
- ◆ Pick a few to focus on

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## Measuring the immeasurable

*When you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot express it in numbers, your knowledge is of a meager and unsatisfactory kind; it may be the beginning of knowledge, but you have scarcely in your thoughts advanced to the state of science.*

—LORD KELVIN

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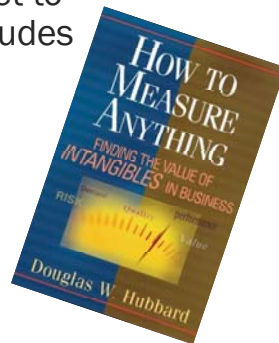
**Measurement is the  
reduction of uncertainty  
about a quantity  
through observation.**



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## **Measuring the immeasurable**

- ◆ Be specific
- ◆ Look for an observable consequence
- ◆ Expand your data collection toolset to measure both behaviors and attitudes
- ◆ Look for a proxy
- ◆ Commit to periodic validation



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## Too many KPIs

- ◆ Separate business drivers from diagnostic measures
- ◆ Require public ownership & accountability



The image shows a close-up of a financial spreadsheet. It features multiple columns and rows of data, with some cells highlighted in yellow and others in green. The text is small and dense, typical of a detailed financial report or budget. The spreadsheet appears to be a complex model with various metrics and calculations.

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## Misguided KPIs

- ◆ Pick your battles wisely
- ◆ Identify checks-and-balances
- ◆ Blame the form
- ◆ Downplay them in your report or dashboard layout

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**Any questions about KPIs?**

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**Creating Meaningful Visualizations**

Numbers don't  
speak for themselves

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## 10 Steps to Great Charts

1. Have a Clear Purpose
2. Consider Your Target Audience(s)
3. Select a Chart Type
4. Add Context
5. Eliminate the Nonessential
6. Emphasize the Important /  
Deemphasize the Less Important
7. Use Color Strategically
8. Ensure Sufficient Contrast
9. Provide Interpretation
10. Be Consistent



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# 1

## Have a clear purpose

Are you trying to **answer a question** or  
**communicate the answer** to the question?



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## 2

### Consider target audience(s)




- ◆ Personal preferences are a factor in the types of visualizations that are meaningful and the level of detail required
- ◆ People at different levels in the organization require different levels of detail.
- ◆ Find the balance between creating one visualization for everybody and creating a different visualization for each person.



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## 3

### Select a chart type





TYPE	EXAMPLES
<b>COLUMN</b> (Regular, Clustered, and Stacked)	
<b>LINE</b>	
<b>AREA</b>	

- ◆ Most often used for time series

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# 3






## Select a chart type

TYPE	EXAMPLES
<b>BAR</b> (Regular, Clustered, and Stacked)	
<b>PIE</b> (Regular, Exploded, and Bar of Pie)	
<b>SCATTER</b>	
<b>BUBBLE</b>	

- ◆ Most often used for a single point in time

# 3

## Select a chart type

TYPE	EXAMPLES
<b>WATERFALL</b>	
<b>FUNNEL</b>	
<b>SPARKLINES</b>	
<b>STACKED CHARTS with VERTICAL SERIES</b>	
<b>BULLET</b>	

- ◆ These aren't native to Excel, but they can still be built in Excel.

# 4

## Add context

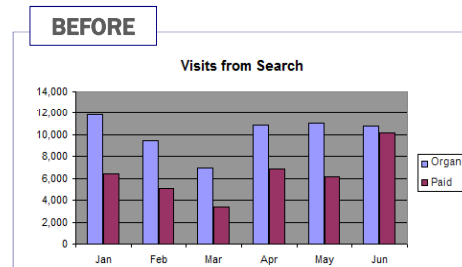
- ◆ Make a comparison
  - Time series
  - Rank
  - Composition
  - Distribution
  - Target
  - Correlation
- ◆ Show historical performance
- ◆ Add change indicators
- ◆ Show % of change
- ◆ Use color coding

Key Metrics					
Metric	13 mo History	July 2009	August 2009	Sept 2009	% Change Prev Mo
Visits		227,072	202,886	181,751	-12% ↓
Unique Visitors		209,824	175,442	147,652	-19% ↓
% Returning Visitors		29%	29%	27%	-7% ↓
% Single Page Visits		46%	44%	46%	4% ↑
Page Views		1,534,226	1,229,239	1,150,086	-7% ↓
Page Views per Visit		6.8	6.1	6.3	4% ↑
Site Satisfaction		254,798	290,393	366,106	21% ↑

# 5

## Eliminate the non-essential

- ◆ Turn off the gridlines option
- ◆ Eliminate the 3<sup>rd</sup> dimension when it isn't meaningful
- ◆ Remove dark backgrounds in the plot area
- ◆ Delete gridlines (when appropriate)
- ◆ Remove the box around the legend
- ◆ Reduce excessive axis values by adjusting the scale



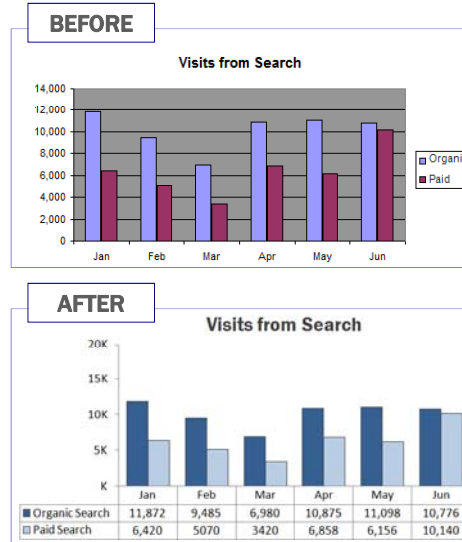


# 6

## Emphasize/Deemphasize

### Emphasize the Important / Deemphasize the Less Important

- ◆ For column and bar graphs, increase the width of the column/bar so that it is wider than the gap
- ◆ Thin and lighten axis lines
- ◆ Reduce the font size and lighten axis values
- ◆ Round off axis values
- ◆ Eliminate unnecessary zeros in axis values

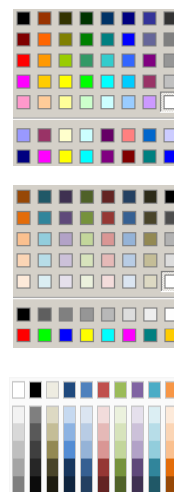


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# 7

## Use color strategically

- ◆ Use color to show that an item is different or that items are similar.
- ◆ Stay with a neutral color palette (generally).
- ◆ Use variations in saturation rather than color when appropriate. Try a color progression to show sequence order.
- ◆ Use rich, bright colors to emphasize change, but be cautious of using stoplight colors (red, yellow and green).



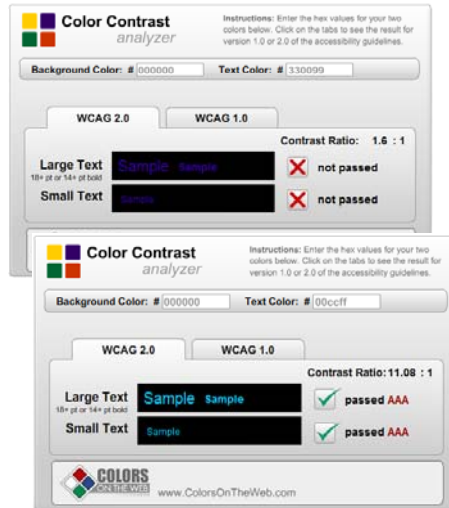
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# 8

## Ensure sufficient contrast

[www.colorsontheweb.com/colorcontrast.asp](http://www.colorsontheweb.com/colorcontrast.asp)

- ◆ Legibility of your charts is significantly impacted by sufficient contrast between text and background colors.
- ◆ The more colors that you use, the more difficult it is to maintain (and judge) sufficient contrast.
- ◆ Make sure your visualization are legible in grayscale



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# 9

## Provide interpretation

### Opportunities

- ◆ Comments area
- ◆ Descriptive chart titles
- ◆ Body of an email
- ◆ Follow up phone call



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# 10

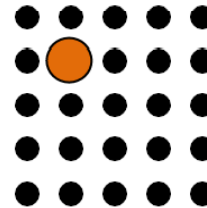
## Be consistent

- ◆ Metrics/messages that are similar should have visualizations that are roughly the same size. If the visualization is bigger than the rest, it should be more important than the rest.
- ◆ Don't change your color palette from chart to chart to make your reports more colorful.

BEFORE

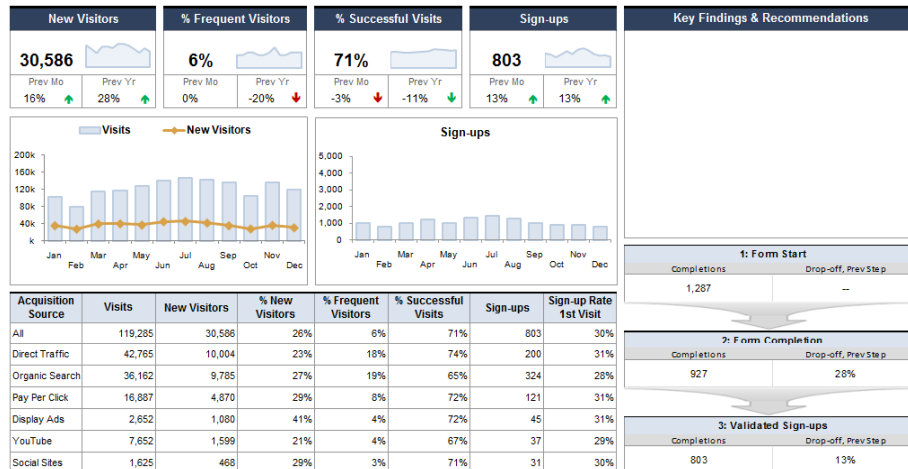


AFTER



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### December 2010



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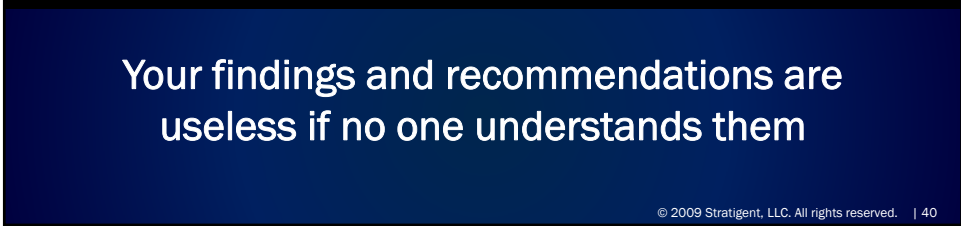


**Any questions about  
creating great graphs?**

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## **Effectively Presenting Your Reports**



**Your findings and recommendations are  
useless if no one understands them**

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## Three Aspects of Good Reports

- ◆ A clear **content structure** helps the stakeholder follow your message.
- ◆ Effective **page layout** helps the user navigate through your reports.
- ◆ A good **presentation** gets results.

## Be diligent about thematic unity

- ◆ Group related information together.
- ◆ Chunk the information into short, discrete sections.
- ◆ Find a common theme.



## Test your logic

- ◆ Eliminate overlap and underlap between the groups you created.
- ◆ Create clear hierarchies of information.

## Write so people don't have to read what you write

- ◆ Follow parallel construction.
- ◆ Make your headings descriptive.
- ◆ Lead each section with a thesis sentence.
- ◆ Use a detailed table of contents.

## A good report designer considers...

- ◆ How the brain processes information
- ◆ How our memory works
- ◆ How we perceive visual cues



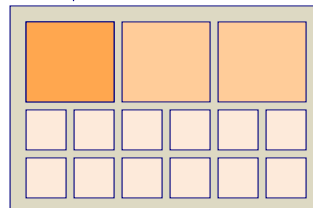
**Gestalt  
Psychology**

Four key principles of Gestalt Psychology apply directly to more effective reporting.

- ◆ Contrast
- ◆ Repetition/Consistency
- ◆ Alignment
- ◆ Placement

Use size and placement to show importance.

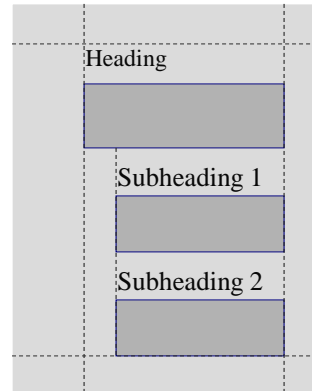
Most Important





## Format to a grid.

- ◆ Information at the same level should line up.
- ◆ Subsections should be indented.



## Place related information together.

- ◆ Avoid one-word lines at the ends of paragraphs.
- ◆ Avoid page breaks where one line of the section is on a separate page.
- ◆ Keep important visuals close to related text. Don't put them in an appendix.

## Use headers and footers

- ◆ What does the reader need in order to keep track of where they're at in the document?
- ◆ If this page gets separated from the rest of the document, what will the reader need to know?

	Always include:	Usually include:
Written documents	<ul style="list-style-type: none"> <li>• Page number</li> <li>• Document title</li> </ul>	<ul style="list-style-type: none"> <li>• Confidential or proprietary</li> <li>• Copyright</li> <li>• "Draft"</li> </ul>
Printed PPTs	<ul style="list-style-type: none"> <li>• Slide number</li> </ul>	<ul style="list-style-type: none"> <li>• Confidential or proprietary</li> <li>• Copyright</li> </ul>
Dashboards	<ul style="list-style-type: none"> <li>• Title</li> <li>• Date</li> </ul>	<ul style="list-style-type: none"> <li>• Confidential</li> </ul>

## Reverse the wave

1. Start with the end

2. Sequence your key messages strategically

3. Close strong

## Three Steps to Great PPTs

- ◆ Use descriptive titles
- ◆ Use visuals that add value and support the message
- ◆ Pay attention to detail

**Bonus Tip:**  
Keep reading your slides?  
Try talking about the next slide  
before flipping to it.



**If you only remember one thing,  
it should be:**

**Focus on making your reports more  
meaningful, not on making them pretty.**

**If you can only implement one suggestion,  
it should be:**

**Clean up your graphs by eliminating “chart  
junk” and emphasizing what is important.**

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**Questions?**

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